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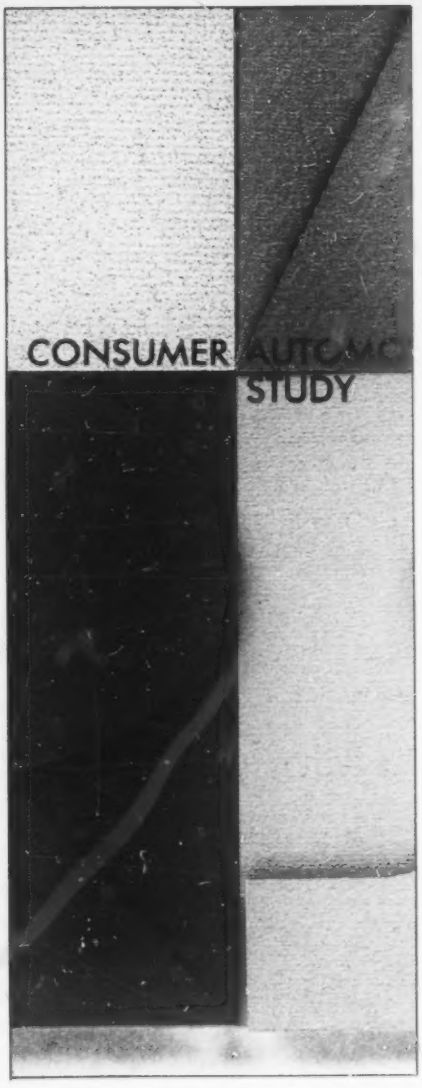

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MARKET LINE

Fuel Injector Cleaner Sales Growing Slowly And Surely

William James, philosopher and brother of novelist Henry James, was once asked why he was a religious man. James replied that he was religious because if there was a God then he would go to heaven. And if there wasn't, it didn't matter. James was a pragmatist.

Likewise, the president of a leading chain told us he uses a fuel injector cleaner every 5,000 miles or so. "I'm not too certain why I do it. I don't know if they do any good or not. It's probably psychological. I don't believe in it, but I do it. I'm afraid of the consequences of not doing it. I'm scared of an expensive repair." The president, too, is a pragmatist.

The executive is not the only pragmatist on the road. With the rise in the number of fuel-injected vehicles, the market for all fuel additives and especially fuel injection cleaners will be a major growth area for chemical sales. Rick Bowen, vice president of marketing at First Brands, Danbury, CT, said, "Fuel injector products have in excess of 50% of the fuel additives market already and they're only five years old."

Fuel Injector Growth

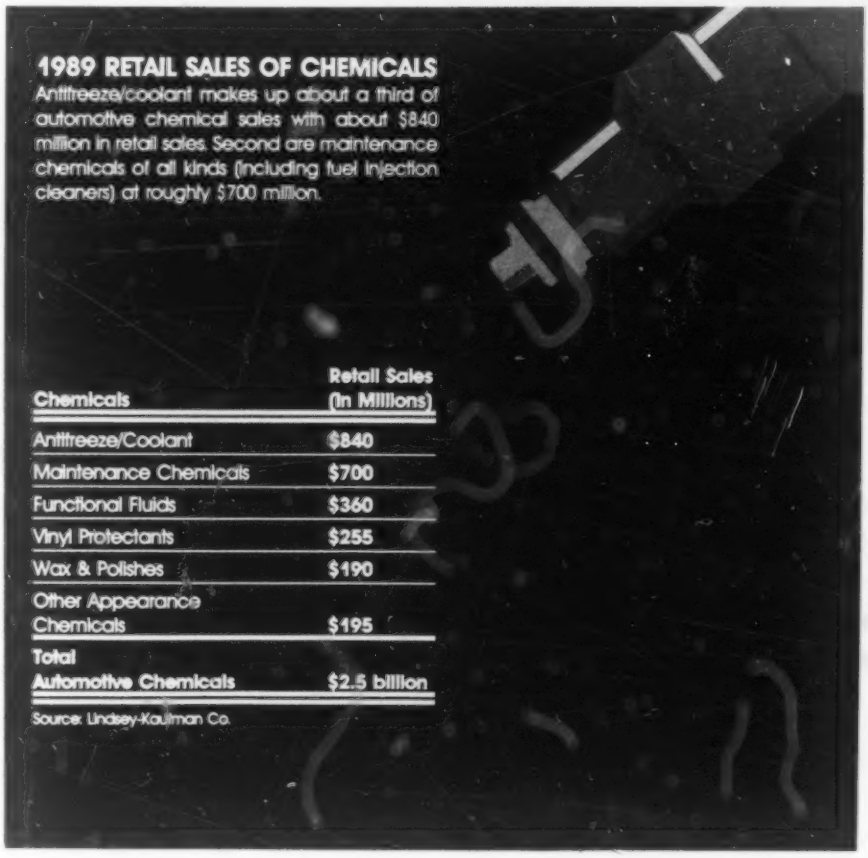
In the early 1980s, just 6% of cars came with fuel injection; but by 1989, according to Motor Vehicle Manufacturer Association (MVMA) data, 96% of the cars made in the U.S. were fuel injected.

Tom Mulrane, group leader of fuels and lubricants at First Brand's new research facility in Danbury, said there are now about 45 million fuel injected cars on the road (some 20 million with throttle body and 25 million with port injection) and some 75 million carbureted. "Light trucks continue to be carbureted, although they're moving toward throttle body injection," Mulrane noted. Another 40 million fuel injected cars will join the fleet by 1995.

"I think the market is going to go up in frequency and total usuage," Truman Blankenship, president of Berryman Products, Arlington, TX, said. "Simply because of the production preference for fuel injection. Injectors display a more noticable effect at a quicker time-frame. A carburetor can take big deposits and still not get a nouceable performance defect. The guy just puts the pedal to the metal and pumps more gas. But because injectors are fed through a metering device, it's much more noticeable."

Berryman Products is not the only company expecting big sales from fuel injection. Without trying hard, we counted more than 20 companies producing a fuel injection cleaner of some kind. One reason for so many suppliers is that there are many niches and regional markets for chemicals. Best estimates say the market breaks down roughly one half through auto stores and the other half through discount and non-automotive stores such as supermarkets and drug stores. A Motor Equipment Manufacturers Association (MEMA) study finds that 56% of automotive chemicals are sold through auto stores.

However, while there is a potentially big market for fuel injection cleaners (any fuel injected car or light truck), the actual market is still fairly small. The highest estimates we received from market sources were up to $80 million for fuel additives. A 1990 estimate by the Fredonia Group,



1989 RETAIL SALES OF CHEMICALS

Antifreeze/coolant makes up about a third of automotive chemical sales with about $840 million in retail sales. Second are maintenance chemicals of all kinds (including fuel injection cleaners) at roughly $700 million.

Chemicals	Retail Sales (In Millions)
Antifreeze/Coolant	$840
Maintenance Chemicals	$700
Functional Fluids	$360
Vinyl Protectants	$255
Wax & Polishes	$190
Other Appearance Chemicals	$195
Total Automotive Chemicals	**$2.5 billion**

Source: Lindsey-Kaufman Co.

MARKET LINE

Cleveland, sets the fuel additive market at $90 million with a 7.6% growth rate.

One anonymous executive put the market at about $100 million but said that included anything that goes in the tank. The fuel injector cleaner share, he feels, is about a third of that market.

But some suppliers say estimates are inflated. "Some $80 million? I seriously question those estimates," Yohanne Gupta, president of Petrofam, Houston, said. "We've been involved with fuel additives since 1984. The actual market ought to be $160-$180 million. What it actually is, though, is about $35 million for fuel additives."

According to our latest *Consumer Automotive Repair Study (CARS)*, published in this issue, about 15% of vehicle maintainers use fuel additives. Just for laughs, we took 15% of 45 million fuel injected vehicles, some 6.75 million, and multiplied that by four (recommended fuel injected cleaner use is every 2,500-4,000 miles) and came up with 27 million bottles sold. After checking newspaper ads for the going price, we assumed an average retail price of $3 a bottle, which gives a retail market of $81 million. Wholesale would be substantially less.

Gupta said to reach the $160-$180 million potential market will require a fundamental change in the way suppliers take the product to market. "As a group, we have to offer some rethinking for consumers: the use of a good quality fuel injection cleaner is fundamental to operating the vehicle efficiently."

A ESTIMATE OF THE FUEL INJECTOR CLEANER MARKET

15% of car maintainers use fuel additives.
45 million cars are fuel injected,
so, some 6.75 million car maintainers use additives.

Average use is four times a year,
so, roughly 27 million bottles are sold.

The average retail price is about $3,
which means a $81 million market.

Source: Automotive Marketing estimates

Do They Work?

The most important concern for fuel additive companies, as Gupta and other suppliers readily concede, is convincing consumers that the products work. Talk to some consumers about additives and the words "snake oil" and "mouse milk" get tossed at you.

"We've all shot ourselves in the foot," Gupta said. "If you look at the history of gas additives, many came into being simply because a 100-store chain told his chemical supplier, 'I need a gas additive.' We have to raise credibility and only offer products that we know work. Only then will consumers accept our message."

Do fuel injector cleaners work? We spoke with technical people at each of the major suppliers. Each insisted their product did exactly what it was intended to do. And all conceded there were bad products on the market. Someone interested in the problem would do well to consult the Society of Automotive Engineers (SAE) Technical Paper #861534: *Injector Deposits—The Tip Of Intake System Deposit Problems*, by Brian Taniguchi, Richard Peyla, Gary Parsons, S. Kent Hoekman, and Douglas Voss.

Fuel Injection & Gasoline

In the 1980s, owners of fuel-injected

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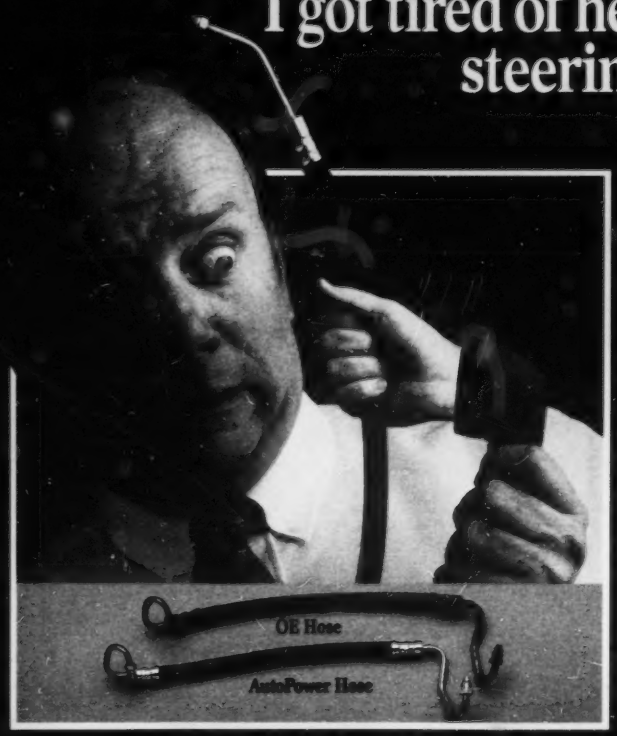

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cars began to complain of poor performance. The fuel injector openings, as small as a human hair, were clogged by deposits, and the only remedy was a few hundred dollars worth of professional cleaning, or even replacement. The OE car makers blamed the gasolines. Several OEs went so far as to threaten to recommend particular brands of gas acceptable for use in fuel injected cars. This got immediate action from the gasoline suppliers and the oil companies developed detergents to clean injectors.

The oil companies quickly trumpeted their detergent gasolines. However, late model cars designed to run on an ultra lean mixture (more air, less gas) are particularly sensitive to deposits that form on the intake valves.

Fred Peterson, senior product specialist, Chevron Chemical Co., San Ramon, CA, said, "Owners found that even small deposits on valves cause driveability problems during the warm-up phase. We suspect that during warm-up, a little deposit acts like a sponge and holds the gas. There's no sensor, so the engine doesn't adjust until the engine warms up enough to evaporate the gas. Cars that were particularly susceptible are generally performance-oriented such as BMWs and Audis."

The oil companies also found that many of the detergents used to clean injectors actually contributed to intake valve deposits. So, it was back to the mixing vats for detergent packages. Today, according to *Consumer Reports* (January, 1990), *most* major gasoline brands' premium gasolines contain additives that both clean injectors and eliminate intake valve deposits. However, *Consumer Reports* noted that at least six major brands *did not* pass a test designed by BMW which had been a key victim of intake valve deposits. Several more brands did not meet BMW standards in medium and regular grade gasolines, according to the magazine.

Fuel injector cleaner suppliers were quick to point out that the problem of gasoline will become more acute as more and more carmakers go to lean-burn technologies to meet emission requirements and still maintain performance standards.

Good Gas Or Bad?

Jack Anderson, marketing manager at Pyroil, a division of Ig-Lo, a subsidiary of Valvoline, Lexington, KY, noted, "Most gasolines have additive packages, but are they as effective as our cleaners? No. The fuel injector cleaners available three years ago have been improved. Initially, they only cleaned the jets. Now they clean the entire intake valve. It's an on-going

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evolutionary technology. Gasoline qualities change and will affect what additives are needed. Some you can get at the pump, some you'll have to buy in the aftermarket."

"There's such a wide variety of detergents in the fuels we buy," Gary Ouellette, vice president and general manager, Cyclo Automotive Products, Lake City, FL, said. "A week ago, the local government down here surveyed octane levels; 10% to 15% weren't the 91 octane they were supposed to be. The detergents aren't necessarily doing what oil companies claim they do. Additives help ensure that you have enough detergents at a maintenance level to keep the injectors clean."

Ray Yabu, trade support manager, Gumout Products—Pennzoil Products, Pittsburgh, said there's also an economic factor. "The oil companies are doing a fine job for us if you look at the economics. We have products that will keep injectors clean for ten tanks for $2.99-$3.99. Now you buy premium gasoline at 20-cents more per gallon. Over ten tankfuls, that certainly exceeds the cost of bottle."

And First Brand's Bowen said, "High detergent gas is not nearly as effective as the oil companies would like you to think. The consumer knows this because they're having problems. I don't want to say it's not effective at all, but it's certainly not effective enough to solve the problem."

Gupta presented the simplest answer: "Gas is such a commodity item. Companies try to match competitor's prices. Too often, the consumer's decision to buy is based on who has the lowest price. We say, go out and buy the best brand of gas. But every 3-to-5,000 miles, buy and use a good fuel injector cleaner."

There are some indications that the message is getting through. Bill Shewry, manager of Chevron's Consumer Products Div., claimed, "The first customers are typically more knowledgeable, sophisticated, upscale users. But that's only the tip of the iceberg." We can support this through our *CARS* Study. According to *CARS*, 33% of the most serious DIYers, ones who should be more knowledgeable about their cars, use fuel additives. That's twice the rate for the general car maintainer population.

Shewry said he expects more demand, maybe 12-18% more sales per year, as fuel injector cleaner sales continue to grow as the fuel injected vehicle population becomes higher. ■

Car Dealers Are Tough Competitors For Volume Retailers

If you think you are not competing with car dealers for parts sales, you are wrong. Data from recent consumer surveys reveal that car dealers and service specialists are gaining share of such fast moving categories as oil, air and fuel filters—even spark plugs.

Moreover, car dealers—and particularly dealers for Asian and European makes—are becoming much more aggressive in wholesaling fast moving parts to the independent aftermarket.

Retailers & Replacement Parts

Volume retailers have to cope with the following problems in connection with

Most serious automotive enthusiasts dismiss wiper blades as low-tech pieces of hardware.

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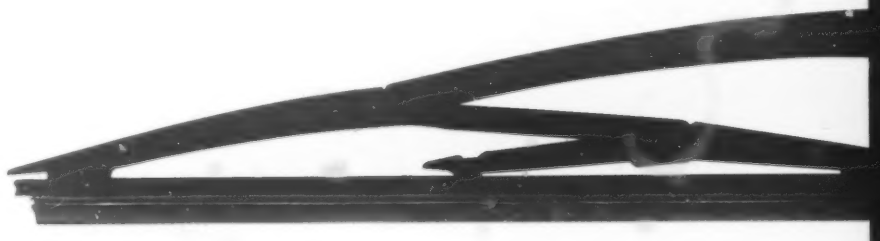

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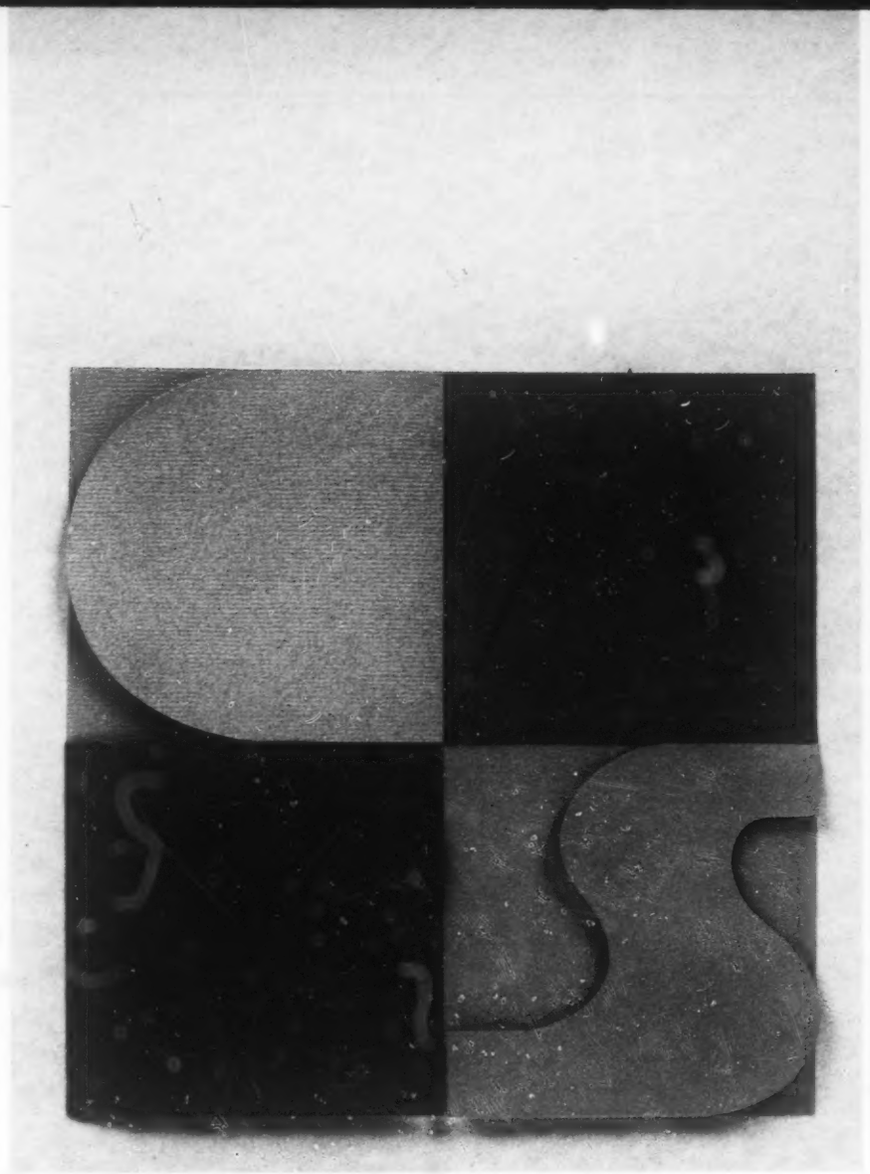

CONSUMER AUTOMOTIVE REPAIR STUDY

The DIYer is the main installer of automotive products among all vehicle maintainers

by **Phil Katcher**
Business Editor

The single question the staff of *Automotive Marketing* is most frequently asked is, "What percentage of my product sales are to Do-It-Yourselfers?" It's a question neither we, nor any other source, has ever been able to answer since all previous industry studies have focused on the DIYer alone, rather than all buyers of specific aftermarket products.

With the 1991 *Consumer Automotive Repair Study (CARS)*, we are able to answer that question—and lots more. This year's study marks the first survey in the aftermarket industry of *everyone* who is responsible for maintaining a vehicle and who bought products to do just that, regardless of from whom they bought the product or who installed it.

We found exciting news for aftermarket retailers in this study. In a nutshell, it's that DIYers are the most common installers of products in almost every automotive system we studied. And, the largest group of buyers in almost every system category bought those products at auto parts stores—not discount or department stores, not service stations or independent garages, not specialty installers or car dealers.

DIYers Are The Main Installers

We expected that to be the case in product categories such as additives and wax and polish. It's no surprise that 73% of all the oil and gas additives sold over the past year were installed by the buyer or a friend or relative.

The surprise was that this trend held true even in areas we did not think it would. For example, 53% of all those who bought starting or charging parts such as alternators bought them in auto parts stores and 52% of them installed the parts themselves or had them put in by a friend, relative, or a "backyard mechanic." Even 42% of all those who bought engine system parts bought them at auto parts stores. And, just under half, 45%, installed those parts themselves or had a friend, relative, or backyard mechanic do the job.

DIY is not dead, not by a long shot. Indeed, when we asked people to classify themselves, 77% called themselves anautomotive DIYer.

And, despite talk about increasingly difficult automotive technology decreasing how much DIY is done, vehicle maintainers aren't aware of being unable to do the work. In all, 44% said they're doing

CONSUMER AUTOMOTIVE REPAIR STUDY

as much of this work now as they did five years ago, while 31% even said they'd increased how much DIY they do. And, 58% expected to do as much DIY work in the future as they're doing now, while almost a quarter more said that they'll be doing more in the future than now. In all, 53% said they enjoy doing automotive DIY, at least "somewhat."

The motoring public is affected by the same demographic trends that affect the entire country, especially the growth of women in the marketplace and the aging of the population. Therefore, it's worth looking especially carefully at these two major groups.

HOW MANY VEHICLE MAINTAINERS THERE ARE

U.S. households with a vehicle	89%
U.S. households with a car	86%
U.S. households with a light truck	26%
U.S. households with a van	11%
U.S. households with a utility vehicle	6%

Women DIYers Are Important

More women are coming into the DIY field as the total number of females responsible for maintaining vehicles increases.

In all, 66% of all women in a household with a vehicle told us they were responsible for maintaining it. Of them, 65% called themselves some sort of automotive DIYer; 85% said the level of their automotive DIY work has stayed the same or increased over the past five years; and 88% said the level of their DIY work will grow or at least stay the same in the future.

Women responsible for vehicle maintenance tend to be responsible for only one vehicle in larger numbers than do men. A third of all men were responsible for only one vehicle, while a little over three quarters of all women had this responsibility level.

The car brands women picked in slightly larger percentages than the overall vehicle owning population included Jeep/Eagle/AMC, Mercury, Plymouth, Ponti-

WHAT THEIR SEXES ARE

We noted if the household representatives to whom we spoke who were responsible for maintaining a vehicle were male or female.

Male	57%
Female	43%

WHAT CARS THEY DRIVE

Serious DIYers, those who spend 11 or more hours a month on automotive DIY, make up the auto parts store's best customer. Therefore, chains should stock products for cars driven by these DIYers, rather than for the entire local car population, many of which will be taken back to car dealers for repair. This chart compares the percentage of all car maintainers owning a specific brand with serious DIYers owning the same brand. Only car brands driven by 1% or more of the population are listed here.

	Everyone	Serious DIYers
Chevrolet	16%	27%
Ford	15%	24%
Oldsmobile	9%	10%
Buick	7%	9%
Pontiac	6%	5%
Dodge	5%	3%
Honda	5%	5%
Nissan/Datsun	5%	2%
Mercury	4%	3%
Plymouth	4%	3%
Toyota	4%	3%
Chrysler	3%	3%
Cadillac	3%	1%
Lincoln	2%	1%
Volkswagen	2%	*
Hyundai	1%	*
Jeep/Eagle/AMC	1%	*
Mazda	1%	*
Mercedes	1%	*
Subaru	1%	*

* Cell too small for accurate measurement.

HOW OLD THEY ARE

We asked vehicle maintainers their age.

Under 18	1%
18-24	11%
25-34	26%
35-44	23%
45-54	14%
55-64	11%
Over 65	14%

CONSUMER AUTOMOTIVE REPAIR STUDY

ac, and Subaru. On the other hand, they tended to pick Fords in lower percentages than the overall population.

Women vehicle maintainers tended to make less money then men; of those making under $20,000 in annual household income 54% were women while 46% were men. However, among those making $20,000 to $30,000, 58% were men and 42% were women, and among those making over $40,000, 69% were male compared to 31% female. Women vehicle maintainers tended to be single, too. Some 58% of women said they were single compared to 64% of male maintainers who said that they were married.

The challenge is to get these women into auto parts stores. Just over a quarter of them reported buying parts in these stores in the previous years. Slightly more bought these products in discount stores, almost as many as those who went to department stores. It is worth noting that women obviously aren't as comfortable at a car dealer as men are; only a tenth of them bought parts at a dealer, compared to 17% of all male maintainers.

Baby Boomer DIYers

The other major demographic trend in the U.S. is the aging of America. There's good news there, too. In all, 82% of those aged between 35 and 44-years-old—the baby boomers—said they were responsible for maintaining a vehicle. Of maintainers in that age group, 88% said they were some sort of DIYer. Of DIYers in that age group, 71% reported that their DIY level over the past five years had increased or stayed the same. And, 84% expected to be doing as much or more DIY work in the future as they are now.

Baby boomers had slightly more vehicles to maintain than the average. Among everyone, 53% were responsible for maintaining only one vehicle; among baby boomers that number fell to 43%. Some 16% of baby boomers maintain three vehicles, compared to 12% of the overall car-owning population.

People tend to think in terms of cars like BMWs as baby boomer brands. But, in truth, most baby boomer income levels don't allow them to drive such expensive cars. They told us that they drove Chevrolets, Dodges, Mazdas, Mitsubishis, and Volvos in larger percentages than the car maintaining public as a whole. We found that they drove Cadillacs, Lincolns, and Oldsmobiles in smaller percentages than the vehicle maintaining public as a whole. As well, they drove more light trucks and vans than the overall vehicle maintaining public did.

To say that baby boomers who are vehicle maintainers aren't all driving Mercedes isn't to say that they can't afford to maintain the vehicles they do drive. In all,

WHAT THEIR INCOMES ARE

We asked vehicle maintainers what their household income levels are.

Under $10,000	9%
10,000-20,000	17%
20,000-30,000	18%
30,000-40,000	17%
40,000-50,000	11%
Over 50,000	18%

Does not equal 100% due to refusals to answer

WHAT THEIR PROFESSIONS ARE

We asked vehicle maintainers what their professions are.

Professional	16%
Retired	15%
Managers (except farm)	11%
Clerical	10%
Craftsmen	10%
Sales	7%
Service workers	5%
Housewife	5%
Operatives (not transport)	4%
Transportation operatives	3%
Laborers (except farm)	3%
Student	3%
Unemployed	2%
Farmers/managers	1%
Armed forces	1%
Farm laborers	0.5%
Private household workers	0.5%

Does not equal 100% due to refusals to answer

WHAT THEIR EDUCATIONAL LEVELS ARE

We asked vehicle maintainers how much schooling they had had.

Some high school	10%
High school graduate	36%
Some college	25%
College graduate	28%

Does not equal 100% due to refusals to answer

HOW MANY VEHICLES THEY MAINTAIN

We asked vehicle maintainers how many vehicles they maintain.

One	53%
Two	29%
Three	12%
Four	4%
Five or more	2%

HOW OFTEN THEY SHOP FOR AUTOMOTIVE PRODUCTS

We asked vehicle maintainers how often they shopped for automotive products over the past year. The top five number of times mentioned were:

Three times	10%
Twice	10%
Once	8%
Four times	7%
Twice a month	7%

WHAT THEIR MARITAL STATUS IS

We asked vehicle maintainers what their marital status is.

Married	54%
Never married	21%
Divorced/separated	16%
Widowed	9%

CONSUMER AUTOMOTIVE REPAIR STUDY

STUDY METHODOLOGY

This year's is a very different *Consumer Automotive Repair Study (CARS)* than has ever been produced before. Previous studies have concentrated on the Do-It-Yourselfer (DIYer); this study was made of everyone, both DIYers and non-DIYers who maintains vehicles—the entire aftermarket customer base. The purpose is to show where the DIY market fits in the overall vehicle maintainer world.

To do this study, as in the previous seven studies, we retained the services of Chilton Research Services, one of the country's leading market research firms. Its interviewers called 1,673 households across the country over a month-long period, asking each respondent if anyone in the household owned one or more vehicles. In all, vehicles were owned in 1,493 households.

The researchers then asked if the person on the phone were responsible for maintaining any of the vehicles. If the person reached on the phone did not qualify as a vehicle maintainer, the interview was ended.

The remainder were then asked to participate in *CARS*. In all, 1,173 individuals who were responsible for maintaining a vehicle cooperated with Chilton Research. These individuals were read a list of automotive products. If they purchased any of these products, they were asked a set of questions about their buying habits for those products. As well, we asked who installed the product—a DIYer or a professional—and why the maintainer chose that method of installation.

The answers that the interviewers got were "top-of-mind" answers. Many questions were open-ended, meaning that the interviewers did not provide a list of possible answers for a respondent to select from. Instead, the interviewers took down the respondent's first answer. Market research professionals feel that lists of suggested answers tend to prejudice the responses.

It must be noted that in no way are the figures produced in this study comparable with previous *CARS* studies which concentrated on DIYers only. However, as in previous studies, this study is nationally projectable, using weighted numbers. It gives an accurate picture of the ultimate consumer for the entire aftermarket—the vehicle maintainer. ■

WHERE THEY SHOP FOR AUTOMOTIVE PRODUCTS

We asked vehicle maintainers where they bought automotive products. Discount stores were the most mentioned location, followed closely by automotive parts stores.

Discount stores	28%
Auto parts stores	26%
Specialty installers	24%
Department stores	22%
Gas station	14%
Car dealership	14%
Hardware store	13%
Supermarket	9%
Convenience store	9%
Drug store	5%

Answer is higher than 100% due to multiple choices.

HOW MUCH TIME IS SPENT ON DIY

We asked vehicle maintainers how many hours a month they spent on automotive DIY work. Almost half spent between one and five hours a month.

1-5 hours	46%
None	32%
Under 1 hour	10%
6-10 hours	7%
11-15 hours	2%
16-20 hours	1%
21-25 hours	1%
26-30 hours	1%

HOW MUCH DIYERS ENJOY AUTOMOTIVE DIY

We asked how much vehicle maintainers who said they did automotive DIY work how much they enjoyed it.

Somewhat	34%
Not too much	26%
Not at all	22%
A lot	18%

IF THEY'RE DOING MORE OR LESS DIY

We asked DIYers if their involvement level with automotive DIY work had changed over the past five years.

Stayed the same	44%
Increased	31%
Decreased	25%

IF THEY'RE GOING TO DO MORE DIY

We asked DIYers if they expected to do more or less automotive DIY work in the future. Most expect to do about the same amount then as now.

Stay the same	58%
Increase	24%
Decrease	18%

32% of the baby boomer in our study made between $30,000 and $40,000 in annual household income, while 29% made over $40,000. This compares to the overall vehicle maintainer population of which 17% made between $30,000 and $40,000 and 29% made over $40,000. It's no surprise that 37% of them were college graduates compared to 28% of the vehicle maintaining population as a whole.

So, they've got vehicles, they're DIYers, and they've got the money to spend on vehicle maintenance. But, auto parts stores aren't getting their share of the business from these maintainers. There's still room for auto parts chains to get baby boomers into their stores. A quarter of all in this age group reported buying parts at an auto parts store last year, while 36% of those under 25-years-old bought in these stores. Almost a third of baby boomers bought parts at some sort of specialty installer such as a quick lube or muffler shop.

The resulting conclusion from looking at DIY levels among all vehicle maintainers is that the automotive aftermarket for the foreseeable future will depend heavily on the DIY segment and that faith will be well placed. ■

CONSUMER AUTOMOTIVE REPAIR STUDY

WAX & POLISH

Wax or polish products were purchased by 19% of all vehicle maintainers last year. They were tied for tenth with starting or charging parts such as alternators or starting motors among product lines we studied.

Of wax and polish buyers, well over half were men, while just over half were between 25 and 44-years-old and spend between one and five hours a month on vehicle DIY.

Buying Wax Or Polish

Automotive wax and polish products are sold in just about every type of retail outlet short of shoe stores. However, when buying the products, men tend to go to either to auto parts stores, 41%, or discount stores, 21%. Women buy just about everywhere. In all 66% of those buying from car dealers, 65% of those buying from supermarkets, and 73% of those buying from drug stores are women.

Just over half of those who spend 11 or more hours a month on automotive DIY buy from an auto parts store, compared to only a third of those who spend between one and five hours a month. However, it's also true that 58% of those who bought the product at an auto parts store spent 1-5 hours while only 8% of those who bought at the same type store spent 11 or more hours a month. In other words, just less than a tenth of all wax and polish DIYers are also serious DIYers but over half of them buy this product at an auto parts store. That's a good market.

Detailing Shops

Detailing shops have a good part of wax and polish sales with a quarter of all women who bought the product having it installed at such a shop. Very similar percentages of the population of those who make over $40,000 in annual household incomes and those who spend less than an hour a month on automotive DIY also went to a detailing shop to have wax and polish applied.

However, most of the people in these groups didn't say, as might have been expected, they did it to get it done right, but rather they said it was to "save time." ■

WHERE THEY BOUGHT WAX OR POLISH

More vehicle maintainers turned to automotive parts stores to buy wax or polish than any other single source. The top five sources are:

Automotive parts store	31%
Discount store	20%
Car wash/detailer	16%
Department store	4%
Specialty installer	4%
Car dealership	4%

WHO APPLIED WAX OR POLISH

DIYers applied more wax or polish than any other single applier. The top five appliers were:

DIYer	76%
Car wash/detailer	17%
Specialty installer	4%
Car dealership	3%
Independent garage	2%

HOW MANY VEHICLES WAX OR POLISH WAS PURCHASED FOR

Most vehicle maintainers bought wax or polish for only one vehicle.

One	57%
Two	32%
Three or more	11%

WHAT TYPE OF VEHICLE THEY BOUGHT WAX OR POLISH FOR

Most vehicle maintainers who bought wax or polish, bought them for a car.

Car	71%
Light truck	7%
Van	2%
Utility vehicle	1%
More than one vehicle	20%

WHY DIYERS APPLIED WAX OR POLISH

Most DIYers applied wax or polish to save money. The top five reasons were:

To save money	32%
It's a simple job	26%
Can do it myself	21%
Make sure it's done right	14%
Enjoyed it	14%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't apply their own wax or polish said they didn't have enough time to. The top five reasons were:

Lack of time	37%
Lack of enjoyment	16%
Get it done right	8%
Lack of knowledge	8%
Inconvenient	4%

DID THEY SHOP AROUND FOR WAX OR POLISH

We asked if the vehicle maintainer shopped around for the best price for wax or polish. Most didn't.

No	62%
Yes	37%

WHAT QUALITY WAX OR POLISH THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line wax or polish. Most maintainers bought what they felt to be the best available.

Top-of-the-line	70%
Middle-of-the-line	27%
Bottom-of-the-line	1%

CONSUMER AUTOMOTIVE REPAIR STUDY

PROTECTANTS

Appearance chemicals include protectants, and tire, vinyl, and upholstery cleaners. They were purchased by 12% of all vehicle maintainers over the previous year; they were the 15th most popular product we studied.

Younger maintainers buy these products; 19% of those under 25-years-old bought them compared to 5% of those over 55. In all, 22% of those who put in 11 or more monthly automotive DIY hours buy the products, compared to 10% who put in less than an hour. Finally, 14% of men buy them compared to 9% of women.

Buying Appearance Chemicals

Not only do men buy more appearance chemicals, but almost twice as many percentage points of men vs women buy them at auto parts stores (41% vs 21%). Women like to buy them in department stores, 15% of women buying there compared to 4% of men buyers. As well, 36% of maintainers under 25-years-old buy them at auto parts stores compared to a quarter of those over 55.

The younger the DIYer, too, the more apt he is to apply his own appearance chemicals. Of those under 25-years-old, 96% applied their own, while 77% of those between 35 and 44 and 60% of those over 55 applied their own. In much the same way, 86% of those with annual household incomes under $20,000 applied their own; 73% of those making $20-30,000 did; and 66% of those making over $40,000 did.

Motives Explained

Oddly enough, only 5% of women said they didn't apply appearance chemicals because they didn't know how to, but 15% of men gave that as their excuse. As well, a quarter of men non-appliers said they didn't like doing it, compared to only 16% of women. However, 15% of women said they didn't because someone else in their household did the job for them—still a DIY job, regardless.

Among those who did the job, the biggest group of women, 42% said they could do it, compared to only 17% of men. "To save money" was the reason for 34% of men and 27% of women. ■

WHERE THEY BOUGHT APPEARANCE CHEMICALS

More vehicle maintainers turned to automotive parts stores to buy appearance chemicals such as protectants and tire cleaners than any other single source. The top five sources are:

Automotive parts store	35%
Discount store	26%
Car wash/detailer	7%
Department store	7%
Supermarket	4%
Car dealership	4%

WHO APPLIED APPEARANCE CHEMICALS

DIYers applied more appearance chemicals than any other single applier. The top five appliers were:

DIYer	83%
Car wash/detailer	8%
Car dealership	3%
Specialty installer	3%
Independent garage	3%

HOW MANY VEHICLES APPEARANCE CHEMICALS WERE PURCHASED FOR

Most vehicle maintainers bought appearance chemicals for only one vehicle.

One	44%
Two	35%
Three or more	17%

WHY DIYERS APPLIED APPEARANCE CHEMICALS

Most DIYers applied appearance chemicals to save money. The top five reasons were:

To save money	33%
It's a simple job	24%
Can do it myself	24%
Enjoyed it	13%
Make sure it's done right	11%

WHAT TYPE OF VEHICLE THEY BOUGHT APPEARANCE CHEMICALS FOR

Most vehicle maintainers who bought appearance chemicals, bought them for a car.

Car	67%
Light truck	6%
Van	3%
Utility vehicle	2%
More than one vehicle	23%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't apply their own appearance chemicals said they didn't have enough time to. The top five reasons were:

Lack of time	28%
Lack of enjoyment	20%
Lack of knowledge	10%
Car in for service	9%
Lack of tools	7%

DID THEY SHOP AROUND FOR APPEARANCE CHEMICALS

We asked if the vehicle maintainer shopped around for the best price for appearance chemicals. Most didn't.

No	61%
Yes	39%

WHAT QUALITY APPEARANCE CHEMICALS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line appearance chemicals. Most maintainers bought what they felt to be the best available.

Top-of-the-line	60%
Middle-of-the-line	40%

CONSUMER AUTOMOTIVE REPAIR STUDY

OIL & GAS ADDITIVES

Some 15% of all vehicle maintainers bought oil or gas additives during the past year. This makes them the eleventh most popular type of product we studied.

Since it's so simple to open a bottle of additive and pour it into the oil or gas, why isn't every additive buyer a DIYer? In all, 34%, the largest group, of men said they were too busy to do the job—only 5% of women gave this excuse. Over a quarter, 27%, of maintainers between 25- and 34-years-old gave this reason, while only 10% of those 45-54 and 7% of those over 55-years-old did. The most offered excuse from women, 35%, was that they didn't know how to do it. That was also the biggest excuse for 35-44-year-old maintainers, the "baby boomers."

The Female Market

Almost half, 45%, of additive buyers were female, quite a large percentage compared to other products.

Female additive buyers, however, aren't going to auto parts stores for additives as often as male buyers. Where 42% of male additive buyers got the products at auto parts stores, only 23% of females shopped at these stores for the product. Indeed, only women mentioned buying additives at drug stores and supermarkets. Clearly, there's a large additive market that auto parts stores are missing.

The Serious DIYer Market

DIYers who spend 11 or more hours a month on vehicle DIY work—serious DIYers—spend more on additives than other DIYers. In all, 32% of this group reported buying additives during the previous year. While 5% of the population responsible for maintaining a vehicle puts in 11 or more hours a month on that vehicle, 11% of additive buyers put in this many hours a month. Moreover, around half buy their additives at auto parts stores.

The second largest supplier of additives to serious DIYers, the gas station, sells to only 18% of the serious DIYers. Indeed, 12% of these serious DIYers also had the service station mechanic put in the additive, obviously an impulse buy for a car already being serviced. ■

WHERE THEY BOUGHT OIL OR GAS ADDITIVES

More vehicle maintainers turned to automotive parts stores to buy oil or gas additives than any other single source. The top five sources are:

Automotive parts store	34%
Gas station	23%
Discount store	17%
Department store	6%
Car dealership	5%

WHO INSTALLED OIL OR GAS ADDITIVES

DIYers installed more oil or gas additives than any other single installer. The top five installers were:

DIYer	73%
Gas station	15%
Car dealership	5%
Specialty installer	3%
Independent garage	2%

WHY DIYERS INSTALLED OIL OR GAS ADDITIVES

Most DIYers installed oil or gas additives to save money. The top five reasons were:

It's a simple job	38%
To save money	37%
Can do it myself	30%
Needed it done	17%
Convenient to do	7%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own oil or gas additives said they didn't know how to. The top five reasons were:

Lack of knowledge	26%
Lack of enjoyment	18%
Lack of time	15%
Car already being serviced	10%
Inconvenient	8%

HOW MANY VEHICLES OIL OR GAS ADDITIVES WERE PURCHASED FOR

Most vehicle maintainers bought oil or gas additives for only one vehicle.

One	69%
Two	23%
Three or more	8%

WHAT TYPE OF VEHICLE THEY BOUGHT OIL OR GAS ADDITIVES FOR

Most vehicle maintainers with only one vehicle who bought oil or gas additives, bought them for a car.

Car	72%
Light truck	7%
Van	4%
Utility vehicle	4%
More than one vehicle	13%

WHAT QUALITY OIL OR GAS ADDITIVES THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line oil or gas additives. Most bought what they felt to be the best.

Top-of-the-line	65%
Middle-of-the-line	31%
Bottom-of-the-line	3%
Don't know	1%

DID THEY SHOP AROUND FOR OIL OR GAS ADDITIVES

We asked if the vehicle maintainer shopped around for the best price for oil or gas additives. Most didn't.

No	54%
Yes	46%

CONSUMER AUTOMOTIVE REPAIR STUDY

PAINT/BODY REPAIR

A total of 8% of all vehicle maintainers purchased some sort of body repair or paint product during the past year. These were the 19th most purchased products among those we studied.

The average body repair or paint product buyer is male, 71%; between 25 and 44-years-old, 65%; makes over $30,000 in annual household income, 55%; spends between one and five hours a month working on his vehicle, 60%; and has one, 42%, or two, 30%, vehicles.

Two Product Types

This category is a difficult one to track because there are two vastly different types of jobs to be done. The individual DIYer can use inexpensive products to repair minor dings, dents, and nicks. The professional shop uses quite different products to repair major body work. It's no surprise, then, that while 19% of all buyers of these products buy them from auto parts stores, another 17% goes to autobody shops—a clear picture of the different types of products available.

To get a good picture, we must look at buyers who also used the product themselves. In all, 91% were men, 30% were between 35 and 44 years old while another 32% were 25 to 34 years old. Some 36% had household incomes of less than $20,000 while 31% made over $40,000 annually—income does not appear to play a part in selling body repair products or paint. Finally, over half, 52%, had to maintain three or more vehicles.

Why They Do It

When asked, just about half the men said they applied their own body repair or paint product to save money. Just over a quarter more said that they did it because they could. Over half of DIYers who were 55-years-old or more did it because they could, as did 67% of those who spend six-to-ten hours a month on automotive DIY. Some 43% of DIYers aged between 25 and 34 years in age, 32% of DIYers making between $20,000 and $40,000, and 31% of DIYers who spend six or more hours a month on automotive DIY enjoy using these products. ■

WHERE THEY BOUGHT BODY REPAIR PRODUCTS OR PAINT

More vehicle maintainers turned to automotive parts stores to buy body repair products or paint than any other single source. The top five sources are:

Automotive parts store	19%
Specialty installer	18%
Autobody shop	17%
Independent garage	16%
Car dealership	15%

WHO INSTALLED BODY REPAIR PRODUCTS OR PAINT

DIYers and independent garages installed more body repair products or paint than any other single installer. The top five installers were:

DIYer	27%
Independent garage	27%
Specialty installer	18%
Body shop	11%
Car dealership	11%

HOW MANY VEHICLES BODY REPAIR PRODUCTS OR PAINT WERE PURCHASED FOR

Most vehicle maintainers bought body repair products or paint for only one vehicle.

One	88%
Two	9%
Three or more	4%

WHAT TYPE OF VEHICLE THEY BOUGHT BODY REPAIR PRODUCTS OR PAINT FOR

Most vehicle maintainers who bought body repair products or paint, bought them for a car.

Car	74%
Light truck	16%
Utility vehicle	4%
Van	3%
More than one vehicle	3%

WHY DIYERS INSTALLED BODY REPAIR PRODUCTS OR PAINT

Most DIYers installed body repair products or paint to save money. The top five reasons were:

To save money	48%
Can do it myself	29%
Enjoyed it	14%
It's a simple job	12%
Needed it done	12%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own body repair products or paint said they didn't know how to. The top five reasons were:

Lack of knowledge	70%
Lack of tools	11%
Lack of time	9%
Get it done right	7%
Done for free	4%

DID THEY SHOP AROUND FOR BODY REPAIR PRODUCTS OR PAINT

We asked if the vehicle maintainer shopped around for the best price for body repair products or paint. Most didn't.

Yes	49%
No	50%
Don't know	1%

WHAT QUALITY BODY REPAIR PRODUCTS OR PAINT THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line body repair products or paint. Nobody bought what they felt to be bottom-of-the-line.

Top-of-the-line	50%
Middle-of-the-line	50%

CONSUMER AUTOMOTIVE REPAIR STUDY

OIL CHANGE PRODUCTS

With 43% of all vehicle maintainers buying motor oil or related products such as oil filters over the course of a year, oil change products are the second most popular product among those we studied.

Just over half, 57%, of oil change product purchasers are male, half are between 25- and 44-years-old, and have an annual household income of $30,000 or more. Slightly less than half spend between one and five hours a month on automotive DIY, and are responsible for maintaining one vehicle.

The Specialty Installers

Quick lubes have gained an increasing share of the oil change market in recent years. The convenience they offer attracts women, of whom almost a quarter had oil change products installed there. Another 16% of women patronized a car dealer, and 15% went to a gas station for oil change products.

Around a quarter of all people who spend less than an hour a month on automotive DIY work visited a quick lube. And, over half of those who had oil change products installed at a quick lube had annual household incomes of $30,000 or more.

On the other hand, quick lubes do not appeal to men as a whole, with only 15% buying oil change products there. Only 12% of those with household incomes of less than $20,000 could afford their services. And, only 6% of DIYers who spend six or more hours a month on DIY patronized a quick lube.

Why They Don't DIY

Since only 9% of women install their own oil change products, there's a large market out there. Only 13% say they don't do the work because they don't like to. But, growing a female oil change market takes education; 54% of women say they don't install oil change products since they don't know how.

Of vehicle maintainers with annual household incomes of $40,000 or more, a quarter say they don't have enough time to change or top off oil. Another 32% say they don't know how to do the job, and 16% say they don't like to do it. ■

WHERE THEY BOUGHT OIL CHANGE PRODUCTS

More vehicle maintainers turned to automotive parts stores to buy oil change products, e.g., oil and oil filter, than any other single source. The top five sources are:

Automotive parts store	26%
Specialty installer	21%
Car dealership	14%
Gas station	13%
Discount store	10%

WHO INSTALLED OIL CHANGE PRODUCTS

DIYers installed more oil change products than any other single installer. The top five installers were:

DIYer	41%
Specialty installer	18%
Car dealership	14%
Gas station	12%
Independent garage	8%

HOW MANY VEHICLES OIL CHANGE PRODUCTS WERE PURCHASED FOR

Most vehicle maintainers bought oil change products for only one vehicle.

One	54%
Two	32%
Three or more	12%

WHAT TYPE OF VEHICLE THEY BOUGHT OIL CHANGE PRODUCTS FOR

Most vehicle maintainers who bought oil change products, bought them for a car.

Car	66%
Light truck	7%
Van	2%
Utility vehicle	1%
More than one vehicle	24%

WHY DIYERS INSTALLED OIL CHANGE PRODUCTS

Most DIYers installed oil change products to save money. The top five reasons were:

To save money	64%
Can do it myself	24%
It's a simple job	19%
Personal enjoyment	10%
Make sure it's done right	7%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own oil change products said they didn't know how to. The top five reasons were:

Lack of knowledge	37%
Lack of time	21%
Lack of enjoyment	13%
Lack of proper tools	9%
Inconvenient	7%

DID THEY SHOP AROUND FOR OIL CHANGE PRODUCTS

We asked if the vehicle maintainer shopped around for the best price for oil change products. Most did.

Yes	55%
No	45%

WHAT QUALITY OIL CHANGE PRODUCTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line oil change products. Most bought what they felt to be the best.

Top-of-the-line	67%
Middle-of-the-line	32%
Bottom-of-the-line	0%

CONSUMER AUTOMOTIVE REPAIR STUDY

EXHAUST

Exhaust system parts such as mufflers, catalytic converters, and pipes, were purchased by 14% of all vehicle maintainers over the course of the past year. This makes these the 13th most purchased product category of all we studied.

Not unexpectedly, the sale of exhaust system parts increased with the more vehicles maintained and the number of DIY hours the DIYer put in. While 11% of those with one vehicle bought exhaust system parts, 22% of those who maintained three or more vehicles bought these products. And, 11% of those who put in less than an hour a month on automotive DIY bought exhaust products, while 19% of those who put in 11 or more hours did.

Specialty Installers Rule

Specialty installers have most of the exhaust system part sales market. In all, 47% said they went to such an installer or muffler shop. Only 16% bought these products from an auto parts store. But, 42% of those who put in 11 or more hours of automotive DIY—the serious DIYers—went to an auto parts store for these products, against 39% who went to a specialty installer. That is the only demographic group we studied who bought more exhaust parts from an auto parts store than a specialty retailer.

When it comes to installing exhaust parts, a third of all serious DIYers did their own job, while 30% went to a specialty installer. Oddly enough, 47% of all men who bought these parts used a specialty installer compared to only 41% of all women. On the other hand, a tenth of all women went to a car dealer for these products' installations, compared to only 3% of all men who bought the products.

In most categories, DIYers installed exhaust parts to save money. When we asked why maintainers didn't do it, however, most men, 43%, said they didn't have the right tools while most women, 72%, said they didn't know how to do it. Of all maintainers younger than 25-years-old, 63% said they didn't know how, while 61% of those with one vehicle to maintain, and half of those who spent less than an hour a month on automotive DIY gave that as their reason for not doing it. ■

WHERE THEY BOUGHT EXHAUST SYSTEM PRODUCTS

More vehicle maintainers turned to specialty installers to buy exhaust system products, e.g., mufflers, catalytic converters, and pipes, than any other single source. The top five sources are:

Specialty installer	44%
Independent garage	17%
Automotive parts store	16%
Car dealership	7%
Gas station	7%

WHO INSTALLED EXHAUST SYSTEM PRODUCTS

Specialty installers and muffler shops installed more exhaust system products than any other single installer. The top five installers were:

Specialty installer	45%
Independent garage	22%
DIYer	14%
Gas station	6%
Car dealership	5%

HOW MANY VEHICLES EXHAUST SYSTEM PRODUCTS WERE PURCHASED FOR

Most vehicle maintainers bought exhaust system products for only one vehicle.

One	91%
Two	7%
Three or more	1%

DID THEY SHOP AROUND FOR EXHAUST SYSTEM PRODUCTS

We asked if the vehicle maintainer shopped around for the best price for exhaust system products. Most did.

Yes	51%
No	49%

WHAT TYPE OF VEHICLE THEY BOUGHT EXHAUST SYSTEM PRODUCTS FOR

Most vehicle maintainers who bought exhaust system products, bought them for a car.

Car	78%
Light truck	13%
Van	4%
Utility vehicle	3%
More than one vehicle	3%

WHY DIYERS INSTALLED EXHAUST SYSTEM PRODUCTS

Most DIYers installed exhaust system products to save money. The top five reasons were:

To save money	64%
Can do it myself	23%
It's a simple job	17%
Personal enjoyment	10%
Needed it done	6%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own exhaust system products said they didn't know how to. The top five reasons were:

Lack of knowledge	42%
Lack of proper tools	29%
Lack of time	12%
Lack of enjoyment	7%
Want it done right	6%

WHAT QUALITY EXHAUST SYSTEM PRODUCTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line exhaust system products. Most bought what they felt to be of average quality.

Middle-of-the-line	58%
Top-of-the-line	39%
Bottom-of-the-line	4%

CONSUMER AUTOMOTIVE REPAIR STUDY

FRONT END PARTS

In all, 11% of all vehicle maintainers purchased some sort of front end part, such as a spring, shock, or strut, during the course of the previous year. These were the 16th most purchased product category among products we studied.

Typically, the front end part buyer is male, 66%; between 25- and 44-years-old, 56%; with an annual household income of over $30,000, 49%; responsible for maintaining one or two vehicles, 35% each; and spends between one and five hours on automotive DIY a month, 53%.

The Specialty Installer

Although with a 33% market share auto parts stores sell most front end parts to vehicle maintainers, certain groups go elsewhere in significant numbers. Almost as many women go to specialty installers for these parts as buy them at auto parts stores. Maintainers 55-years-old or more also like specialty installers, with 41% of them going there for these parts, compared to only 24% who go to auto parts stores. A quarter of maintainers with annual household incomes of over $40,000 go to specialty installers compared to only 18% who go to auto parts stores.

The independent garage attracts 21% of those making between $30,000 and $40,000 annually, while only 11% of all maintainers buy from these sources. Almost a quarter of those making over $40,000 return to car dealers, roughly the same amount of those who spend less than an hour a month on vehicle DIY.

Why They Don't DIY

Not having the specialized tools for replacing many front end parts, such as spring compressors for struts, stops many maintainers who said they would otherwise do the job. In all, 45% of all men gave this as their excuse, while only 40% said they didn't know how to do the job. Indeed, 60% of those who spend between six and ten hours a month on automotive DIY who didn't install their own front end parts lacked the proper tools. Most women who didn't put in their own front end parts, 69%, said they didn't know how to, as did 59% of maintainers between 25- and 44-years-old. ■

WHERE THEY BOUGHT FRONT END PARTS

More vehicle maintainers turned to automotive parts stores to buy front end parts such as springs than any other single source. The top five sources are:

Automotive parts store	33%
Specialty installer	19%
Car dealership	14%
Independent garage	11%
Discount store	4%

WHO INSTALLED FRONT END PARTS

DIYers installed more front end parts than any other single installer. The top five installers were:

DIYer	38%
Specialty installer	23%
Independent garage	14%
Car dealership	13%
Department store	4%

HOW MANY VEHICLES FRONT END PARTS WERE PURCHASED FOR

Most vehicle maintainers bought front end parts for only one vehicle.

One	87%
Two	10%
Three or more	2%

WHAT TYPE OF VEHICLE THEY BOUGHT FRONT END PARTS FOR

Most vehicle maintainers with only one vehicle who bought front end parts, bought them for a car.

Car	73%
Light truck	13%
Utility vehicle	5%
Van	4%
More than one vehicle	5%

WHY DIYERS INSTALLED FRONT END PARTS

Most DIYers installed front end parts to save money. The top five reasons were:

To save money	56%
Needed it done	23%
Can do it myself	23%
Enjoyed it	12%
I'm a mechanic	12%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own front end parts said they didn't know how to. The top five reasons were:

Lack of knowledge	53%
Lack of tools	32%
Lack of time	16%
Lack of enjoyment	7%
Want it done right	5%

DID THEY SHOP AROUND FOR FRONT END PARTS

We asked if the vehicle maintainer shopped around for the best price for front end parts. Most didn't.

No	59%
Yes	41%

WHAT QUALITY FRONT END PARTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line front end parts. Most maintainers bought what they felt to be the best available.

Top-of-the-line	66%
Middle-of-the-line	34%

CONSUMER AUTOMOTIVE REPAIR STUDY

REPAIR MANUALS

Automotive repair manuals were purchased by 5% of all vehicle maintainers during the course of the previous year. However, 13% of maintainers who spend between six and 10 hours a month on automotive DIY and 11% of those who spend 11 or more hours also bought books within the year. This means that the serious DIYers who buy automotive products in large numbers from auto parts stores also buy more manuals than does the average population.

Book buyers tend to be male and young (the percentage of book buyers drops off in every age group after 34).

Shopping At Auto Parts Stores

Some categories of vehicle maintainers look for repair manuals at auto parts stores more than other categories. Half of those making between $30,000 and $40,000 in annual household income and half of those making over $40,000 bought their manuals at auto parts stores. Among those making $20,000 to $30,000, 71% bought manuals there. About half of those with only one vehicle and half of those whose DIY involvement is increasing also shopped at auto parts stores for manuals. Over half of those younger than 34-years-old and 45- to 54-years-old bought their manuals there.

At the same time only 28% of those aged between 35- and 44-years-old bought manuals at auto parts stores, while almost a quarter of them went to a book store instead. Only 22% of those who spent less than an hour on automotive DIY a month went to an auto parts store, while 30% of this group bought their manuals at car dealerships.

Buying More Than One

Since most people buy only one manual for every vehicle they must maintain and since few people buy more than one vehicle during the course of a year, it's surprising to find a fair number of people who bought more than one repair manual during the course of last year. However, 16% of all maintainers who bought manuals bought two of them, 4% bought three, 3% bought four, 2% bought five, 3% bought six, and 2% bought eight. ■

WHERE THEY BOUGHT REPAIR MANUALS

More vehicle maintainers turned to automotive parts stores to buy repair manuals than any other single source. The top five sources are:

Automotive parts store	48%
Book store	11%
Discount store	11%
Department store	9%
Car dealership	7%

WHO BOUGHT REPAIR MANUALS BY GENDER

More men bought repair manuals than women.

Males	70%
Females	30%

WHO BOUGHT REPAIR MANUALS BY AGE

Purchase levels among vehicle maintainers drop off as maintainers get older.

Less than 25 years	13%
25-34	32%
35-44	25%
45-54	17%
55+	11%

WHO BOUGHT REPAIR MANUALS BY INCOME

Vehicle maintainers at both ends of the total household income spectrum bought repair manuals.

Less than $20K	28%
$20-30K	15%
$30-40K	18%
$40K+	28%

HOW MANY MANUALS THEY BOUGHT

A considerable number of vehicle maintainers bought more than one manual.

One	67%
Two	16%
Three or more	12%

HOW MANY VEHICLES THEY BOUGHT MANUALS FOR

Almost a quarter of maintainers bought manuals for two vehicles.

One	67%
Two	23%
Three or more	7%

WHAT TYPES OF VEHICLES THEY BOUGHT MANUALS FOR

Most vehicle maintainers bought a repair manual describing their car.

Car	72%
Light truck	9%
Van	6%
More than one vehicle	13%

DID THEY SHOP AROUND FOR MANUALS

We asked if the vehicle maintainer shopped around for the best price for repair manuals. Most didn't.

No	70%
Yes	28%
Don't know	2%

WHAT QUALITY MANUALS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line repair manuals. Most maintainers bought what they felt to be the best available.

Top-of-the-line	57%
Middle-of-the-line	37%
Bottom-of-the-line	2%
Don't know	4%

CONSUMER AUTOMOTIVE REPAIR STUDY

LIGHTING

Lighting products, such as headlights and off-road lights, were purchased by 15% of all vehicle maintainers. They were the 11th most purchased item studied.

In all, 66% of all lighting purchasers were male and half were between 25- and 44-years-old. However, 29% had annual household incomes of under $20,000 annually, while 37% had annual household incomes of over $40,000. Interestingly, lighting products were more commonly purchased by less active DIYers; 48% spent one to five hours monthly on automotive DIY while 34% spent less than an hour. Only 9% spent over 11 hours. As well, 46% were responsible for maintaining one vehicle; 31% for two; and 23% for three or more.

Lighting Buying Patterns

In all, 69% of people who bought lighting products at auto parts stores were men. As well, 81% of those who bought at discount stores were male; they obviously were comfortable picking up their lighting products without the help of expert sales personnel. However, 67% of those who bought them at car dealers were women, while 63% of those who bought at a specialty installer were also women. It would appear, therefore, that generally women are less comfortable picking out lighting products without some sort of advice.

As well, 81% of those who bought lighting products in independent garages also spent less than an hour a month on DIY work. One might think this would mean that non-DIYers generally need help in picking out the right products. However, just over half (55%) of those who purchased lighting products in department stores, where generally it is hard to get expert advice, were also people who spent less than an hour a month on vehicle DIY.

Installing The Products

When it came to installing lighting products, just over a quarter of female buyers turned to a friend or relative, while another 21% installed their own. Among men, slightly over three quarters installed their own, while 8% respectively had them installed by gas stations or independent garages. ■

WHERE THEY BOUGHT LIGHTING PRODUCTS

More vehicle maintainers turned to automotive parts stores to buy lighting products such as headlights or fog lights than any other single source. The top five sources are:

Automotive parts store	50%
Discount store	13%
Gas station	10%
Independent garage	8%
Car dealership	7%

WHO INSTALLED LIGHTING PRODUCTS

DIYers installed more lighting products than any other single installer. The top five installers were:

DIYer	71%
Independent garage	9%
Gas station	8%
Car dealership	7%
Specialty installer	3%

HOW MANY VEHICLES LIGHTING PRODUCTS WERE PURCHASED FOR

Most vehicle maintainers bought lighting products for only one vehicle.

One	85%
Two	13%
Three or more	2%

WHAT TYPE OF VEHICLE THEY BOUGHT LIGHTING PRODUCTS FOR

Most vehicle maintainers who bought lighting products, bought them for a car.

Car	74%
Light truck	12%
Van	4%
Utility vehicle	2%
More than one vehicle	8%

WHY DIYERS INSTALLED LIGHTING PRODUCTS

Most DIYers installed lighting products to save money. The top five reasons were:

To save money	42%
It's a simple job	35%
Can do it myself	18%
To save time	9%
Convenient to do	6%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own lighting products said they didn't know how to. The top five reasons were:

Lack of knowledge	52%
Lack of time	14%
Lack of tools	7%
Inconvenient	6%
Want it done right	5%

DID THEY SHOP AROUND FOR LIGHTING PRODUCTS

We asked if the vehicle maintainer shopped around for the best price for lighting products. Most didn't.

No	64%
Yes	36%

WHAT QUALITY LIGHTING PRODUCTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line lighting products. Most maintainers bought what they felt to be the best available.

Top-of-the-line	55%
Middle-of-the-line	42%
Bottom-of-the-line	3%

CONSUMER AUTOMOTIVE REPAIR STUDY

TUNE-UP PARTS

Tune-up products such as spark plugs and wires were purchased by 30% of all vehicle maintainers, making this type of product the fifth most purchased product of all those we studied.

Among purchasers of tune-up products, 64% were male, 53% were between 25- and 44-years-old, half had annual household incomes of over $30,000, slightly over half spent between one and five hours a month on automotive DIY work, and 47% were responsible for maintaining only one vehicle.

In every demographic group, the auto parts store is the favorite place to buy these products. Even women tend to buy the products in auto parts store, 37%, over the second place retailer, the car dealer, 26%.

The Specialty Installer

Only 9% of tune-up product buyers bought them at a specialty installer. Certain groups patronized specialty tune-up parts installers more than others. Younger buyers are one example; 13% of those under 25-years-old bought tune-up products at a specialty installer. Then the numbers fall off as ages increase until retirement. The percentage of those 25- to 34-years-old is 11%, falling to 6% among those 35- to 44-years-old, and 4% among those 45- to 54-years-old. But, 11% of those older than 55 go to these outlets.

As well, those making between $20,000 and $40,000 in annual household incomes patronize specialty tune-up parts installers at a higher rate, 25% respectively, than others. In all, a quarter of all those in this income bracket who bought tune-up parts went to specialty installers.

Why They Don't DIY

Training vehicle maintainers how to install tune-up parts is vital if this market is to grow. Just over half of all non-DIYers said they didn't know how to do the job. However, that number grows to three quarters of all female non-DIYers. Some 66% of non-DIYers with only one vehicle also gave this as their excuse. In all, 60% of maintainers over 55-years-old also cited this reason—clearly a fear of advanced underhood technology. ■

WHERE THEY BOUGHT TUNE-UP PARTS

More vehicle maintainers turned to automotive parts stores to buy tune-up parts than any other single source. The top five sources are:

Automotive parts store	43%
Car dealership	21%
Independent garage	11%
Specialty installer	9%
Gas station	8%

WHO INSTALLED TUNE-UP PARTS

DIYers installed more tune-up parts than any other single installer. The top five installers were:

DIYer	44%
Car dealership	20%
Independent garage	14%
Specialty installer	10%
Gas station	9%

HOW MANY VEHICLES TUNE-UP PARTS WERE PURCHASED FOR

Most vehicle maintainers bought tune-up parts for only one vehicle.

One	68%
Two	23%
Three or more	9%

WHAT TYPE OF VEHICLE THEY BOUGHT TUNE-UP PARTS FOR

Most vehicle maintainers who bought tune-up parts, bought them for a car.

Car	69%
Light truck	12%
Van	2%
Utility vehicle	2%
More than one vehicle	15%

WHY DIYERS INSTALLED TUNE-UP PARTS

Most DIYers installed tune-up parts to save money. The top five reasons were:

To save money	60%
Can do it myself	28%
It's a simple job	15%
Needed it done	13%
Personal enjoyment	11%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own tune-up products said they didn't know how to. The top five reasons were:

Lack of knowledge	54%
Lack of time	18%
Lack of proper tools	12%
Lack of enjoyment	9%
Lack of personal confidence	7%

DID THEY SHOP AROUND FOR TUNE-UP PARTS

We asked if the vehicle maintainer shopped around for the best price for tune-up parts. Most didn't.

No	53%
Yes	47%

WHAT QUALITY TUNE-UP PARTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line tune-up products. Most bought what they felt to be the best.

Top-of-the-line	66%
Middle-of-the-line	33%
Bottom-of-the-line	0%

CONSUMER AUTOMOTIVE REPAIR STUDY

COOLING SYSTEM PARTS

Cooling system parts were purchased by 8% of all vehicle maintainers. They were the 20th most purchased product of all those we studied.

Just over three quarters of cooling system purchasers were male, while almost half (47%) were 35-years-old or older, 53% made $30,000 in annual household income or more, and 59% spent 1-5 hours a month on automotive DIY work.

Where They Buy

Almost half of all cooling system parts buyers purchased the parts at an auto parts store. Yet, there are some differences among specific buying groups as to where they bought. For example, 56% of all male buyers went to auto parts stores and another 11% to car dealers. This compares with 45% of female buyers who went to an independent garage, with another 22% going to a dealer. Only 21% bought these parts at an auto parts store.

Serious DIYers, those spending 11 or more hours a month on DIY, bought the parts at auto parts stores in overwhelming numbers—88%—compared to only 22% of those who spent less than an hour a month. In all, 32% of the minimal DIYers went to independent garages, compared to only 11% of serious DIYers.

Who Installs The Parts

There are definite patterns to DIYers who install their own cooling system parts. In all, 60% of the men who bought these parts installed them themselves, while only 5% of females did. Younger DIYers install more parts than older DIYers. In all, 66% of DIYers 25-years-old or younger installed their own, compared to only 33% of those 45-to-54-years-old and 39% of those over 55. Just over half (52%) of those with annual household incomes of less than $20,000 installed their own, compared to 35% of those making more than $40,000. Over three quarters of DIYers spending 11 or more hours a month on DIY installed their own, compared to only 31% of those who spent less than an hour a month. And, just over half of those with three vehicles installed their own compared to a quarter who maintained one vehicle. ■

WHERE THEY BOUGHT COOLING SYSTEM PARTS

More vehicle maintainers turned to automotive parts stores to buy cooling system parts such as fans, hoses, or replacement radiators than any other single source. The top five sources are:

Automotive parts store	48%
Independent garage	19%
Car dealership	13%
Gas station	5%
WD	3%

WHO INSTALLED COOLING SYSTEM PARTS

DIYers installed more cooling system parts than any other single installer. The top five installers were:

DIYer	57%
Independent garage	20%
Car dealership	16%
Gas station	4%
Specialty installer	2%

HOW MANY VEHICLES COOLING SYSTEM PARTS WERE PURCHASED FOR

Most vehicle maintainers bought cooling system parts for only one vehicle.

One	86%
Two	13%
Three or more	1%

WHAT TYPE OF VEHICLE THEY BOUGHT COOLING SYSTEM PARTS FOR

Most vehicle maintainers who bought cooling system parts, bought them for a car.

Car	63%
Light truck	20%
Van	7%
Utility vehicle	3%
More than one vehicle	8%

WHY DIYERS INSTALLED COOLING SYSTEM PARTS

Most DIYers installed cooling system parts to save money. The top five reasons were:

To save money	62%
Can do it myself	20%
To save time	15%
Needed it done	11%
Simple to do	9%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own cooling system parts said they didn't know how to. The top five reasons were:

Lack of knowledge	47%
Lack of time	18%
Lack of tools	10%
Already being serviced	9%
Lack of enjoyment	7%

DID THEY SHOP AROUND FOR COOLING SYSTEM PARTS

We asked if the vehicle maintainer shopped around for the best price for cooling system parts. Most didn't.

No	65%
Yes	33%
Don't know	2%

WHAT QUALITY COOLING SYSTEM PARTS THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line cooling system parts. Most maintainers bought what they felt to be the best available.

Top-of-the-line	50%
Middle-of-the-line	45%
Bottom-of-the-line	4%
Don't know	2%

CONSUMER AUTOMOTIVE REPAIR STUDY

BATTERIES

With 32% of all vehicle maintainers buying a battery during the course of a year, batteries are the fourth most purchased product we studied.

The average battery buyer is male, 61%; between 25- and 44-years-old, 50%; has an annual household income of more than $30,000, 46%; spends between one and five hours a month on automotive DIY, 50%; and maintains one, 42%; or two, 31%, cars.

Where They Buy Batteries

Different battery buying patterns are clear in different groups of individuals. Women prefer to go to a specialty installer more than do men; 82% of buyers there are women vs. only 18% of men. Of battery buyers at tire stores, 62% are women as opposed to only 38% who are men. Men go to WDs, with 73% of buyers from that source being male vs 28% of them being women. Men also prefer discount stores, with 77% of buyers there being male.

Over half, 55%, of all vehicle maintainers who spend 11 or more hours a month on automotive DIY bought their batteries at auto parts stores. On the other hand, only a quarter of those who spend less than an hour on automotive DIY bought a battery at an auto parts store; another 22% went to a department store.

Why Not Install?

Since many places that sell batteries offer free installation, we've long wondered why people would prefer to install their own. And, indeed, 41% of everyone who bought a battery installed it. Over half of men, of those with annual household incomes of $20,000 to $30,000, of DIYers spending six or more hours a month on DIY, and with three vehicles to maintain installed their own batteries.

Most men said they did it to save money, 34%; as did 37% of those with three or more vehicles to maintain. Of those making between $20,000 and $30,000, most, 35%, said it just was something they could do, as did 31% of those spending six or more hours on automotive DIY a month. ■

WHERE THEY BOUGHT BATTERIES

More vehicle maintainers turned to automotive parts stores to buy batteries than any other single source. The top five sources are:

Automotive parts store	31%
Department store	20%
Gas station	11%
Discount store	11%
Car dealership	7%

WHO INSTALLED BATTERIES

DIYers installed more batteries than any other single installer. The top five installers were:

DIYer	56%
Department store	11%
Gas station	9%
Car dealership	7%
Independent garage	7%

HOW MANY VEHICLES BATTERIES WERE PURCHASED FOR

Most vehicle maintainers bought batteries for only one vehicle.

One	84%
Two	13%
Three or more	3%

WHAT TYPE OF VEHICLE THEY BOUGHT BATTERIES FOR

Most vehicle maintainers with only one vehicle who bought batteries , bought them for a car.

Car	72%
Light truck	13%
Van	4%
Utility vehicle	2%
More than one vehicle	9%

WHY DIYERS INSTALLED BATTERIES

Most DIYers installed batteries to save money. The top five reasons were:

To save money	35%
It's a simple job	32%
Can do it myself	24%
Needed it done	17%
Convenient to do	7%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own batteries said they didn't know how to. The top five reasons were:

Lack of knowledge	37%
Lack of time	10%
Car already being serviced	10%
Lack of enjoyment	10%
Done for free	9%

DID THEY SHOP AROUND FOR BATTERIES

We asked if the vehicle maintainer shopped around for the best price for batteries. Most didn't.

No	50%
Yes	49%
Don't know	1%

WHAT QUALITY BATTERIES THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line batteries . Most bought what they felt to be middle-of-the-line or top-of-the-line.

Middle-of-the-line	48%
Top-of-the-line	48%
Bottom-of-the-line	1%
Don't know	3%

CONSUMER AUTOMOTIVE REPAIR STUDY

ANTIFREEZE/COOLANT

In all, 27% of all vehicle maintainers purchased the antifreeze/coolant last year. It was the sixth most popular product among those studied.

Almost equal numbers of male and female maintainers purchased the product. Purchase levels are also fairly equal among other demographic groups. However, while 48% of antifreeze/coolant purchasers had one vehicle, the percentage drops to 32% for those with two vehicles, and 20% for those with three or more.

A Discounted Product

The discount store is the most popular place to buy antifreeze/coolant. Men buy it there more than women, as do those making less than $20,000 in annual household income, those who spend one to five hours a month on vehicle DIY, and those maintaining one vehicle. Auto parts stores are most popular with men, as well, along with maintainers less than 25-years-old, maintainers making over $30,000 in annual household income, and those maintaining two vehicles.

Only a handful had antifreeze/coolant installed at a discount or automotive store with service facilities. Females who had the product professionally installed turned to gas stations and independent garages. Considerably fewer men who had professional installation went to a gas station, although independent garages installed the product for a tenth of all men.

Asking Why

In all, 86% of women who installed their own antifreeze/coolant said they did it just because it was easy to do or they could do it. Just over a quarter said they saved money by DIY. However, 42% of men did it to save money, while 55% of men said it was easy or they could do it.

There are, however, still female vehicle maintainers who haven't gotten the message about how easy it is to install antifreeze/coolant. Of those who didn't, 37% said they didn't know how, compared to 9% of male maintainers. The largest single group of males who didn't do the job, 27%, had it installed while the vehicle was in for some other service job; 14% of women said the same. ■

WHERE THEY BOUGHT ANTIFREEZE/COOLANT

More vehicle maintainers turned to discount stores to buy antifreeze/coolant than any other single source. The top five sources are:

Discount store	28%
Automotive parts store	24%
Independent garage	10%
Gas station	9%
Car dealership	8%

WHO INSTALLED ANTIFREEZE/COOLANT

DIYers and installed more antifreeze/coolant than any other single installer. The top five installers were:

DIYer	68%
Independent garage	13%
Gas station	8%
Car dealership	7%
Specialty installer	3%

HOW MANY VEHICLES ANTIFREEZE/COOLANT WAS PURCHASED FOR

Most vehicle maintainers bought antifreeze/coolant for only one vehicle.

One	62%
Two	28%
Three or more	10%

WHAT TYPE OF VEHICLE THEY BOUGHT ANTIFREEZE/COOLANT FOR

Most vehicle maintainers who bought antifreeze/coolant bought it for a car.

Car	68%
Light truck	8%
Van	3%
Utility vehicle	2%
More than one vehicle	19%

WHY DIYERS INSTALLED ANTIFREEZE/COOLANT

Most DIYers installed antifreeze/coolant to save money. The top five reasons were:

To save money	38%
It's a simple job	35%
Can do it myself	27%
Needed it done	15%
Convenient to do	4%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own antifreeze/coolant said they didn't didn't know how to. The top five reasons were:

Lack of knowledge	28%
Car already being serviced	18%
Lack of enjoyment	16%
Lack of time	12%
Lack of tools	7%

DID THEY SHOP AROUND FOR ANTIFREEZE/COOLANT

We asked if the vehicle maintainer shopped around for the best price for antifreeze/coolant. Most did.

Yes	53%
No	46%

WHAT QUALITY ANTIFREEZE/COOLANT THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line antifreeze/coolant. Most maintainers bought what they felt to be the best available.

Top-of-the-line	65%
Middle-of-the-line	31%
Bottom-of-the-line	1%
Don't know	1%

CONSUMER AUTOMOTIVE REPAIR STUDY

WIPER BLADES

Windshield wipers or blades were purchased by 21% of all vehicle maintainers over the course of the previous year. They are the eighth most widely purchased product we studied.

Male vehicle maintainers were 62% of all wiper purchasers. By age, 49% were between 25- and 44-years-old; 45% make over $30,000 in annual household income; and 46% spend between one and five hours a month on automotive DIY. Of wipers buyers, 42% maintain one vehicle, while 34% maintain two.

Where They Buy

There is very little difference in purchase patterns between male and female wiperblade maintainers. In all, 41% of all males and a third of all females purchased wipers at an auto parts store. Maintainers under 25-years-old go to auto parts stores in greater numbers than maintainers over 25-years-old. And, serious DIYers who spend 11 or more hours a month on maintenance are also big auto parts stores patronizers for wipers.

Patterns change when it comes to having blades put on. Three quarters of all males install their own blades only a quarter of females do so. There's relatively little difference in installation patterns by age groups, although generally the younger the DIYer, the greater the chance he'll put it on himself. And, while three quarters of the 11-hour plus DIYers install their own blades, only 35% of those who spend an hour or less do the same.

It's An Easy Job

Putting on wipers is an easy job that doesn't require special tools. So, only 3% of men said they didn't know how to do the job but almost half of women who didn't install their own blades gave this as their excuse. As well, 58% of maintainers who make under $20,000 in annual household income had this excuse.

The major excuse for men was that they were too busy, with 29% citing this as their reason. And, an interesting 38% of all those who spend 11 or more hours a month on vehicle maintenance said they didn't change their own wipers because they lacked the proper tools! ■

WHERE THEY BOUGHT WIPERS OR BLADES

More vehicle maintainers turned to automotive parts stores to buy windshield wipers or blades than any other single source. The top five sources are:

Automotive parts store	38%
Discount store	16%
Gas station	13%
Car dealership	10%
Specialty installer	5%

WHO INSTALLED WIPERS OR BLADES

DIYers installed more windshield wipers or blades than any other single installer. The top five installers were:

DIYer	69%
Gas station	9%
Independent garage	7%
Car dealership	5%
Auto parts store	3%

HOW MANY VEHICLES WIPERS OR BLADES WERE PURCHASED FOR

Most vehicle maintainers bought windshield wipers or blades for only one vehicle.

One	72%
Two	25%
Three or more	3%

WHAT TYPE OF VEHICLE THEY BOUGHT WIPERS OR BLADES FOR

Most vehicle maintainers with only one vehicle who bought windshield wipers or blades, bought them for a car.

Car	68%
Light truck	9%
Utility vehicle	4%
Van	4%
More than one vehicle	16%

WHY DIYERS INSTALLED WIPERS OR BLADES

Most DIYers installed windshield wipers or blades because it was easy to do. The top five reasons were:

It's a simple job	40%
To save money	33%
Can do it myself	26%
Needed it done	15%
Convenient to do	6%

WHY THEY DIDN'T DO THE JOB THEMSELVES

Most vehicle maintainers who didn't install their own windshield wipers or blades said they didn't didn't know how to. The top five reasons were:

Lack of knowledge	32%
Lack of time	17%
Car already being serviced	11%
Lack of enjoyment	10%
Get it done right	6%

DID THEY SHOP AROUND FOR WIPERS OR BLADES

We asked if the vehicle maintainer shopped around for the best price for windshield wipers or blades. Most did.

Yes	70%
No	30%

WHAT QUALITY WIPERS OR BLADES THEY BOUGHT

We asked if the vehicle maintainer bought top-of-the-line, middle-of-the-line, or bottom-of-the-line windshield wipers or blades. Few maintainers bought what they felt to be bottom-of-the-line.

Top-of-the-line	47%
Middle-of-the-line	47%
Bottom-of-the-line	4%
Don't know	2%